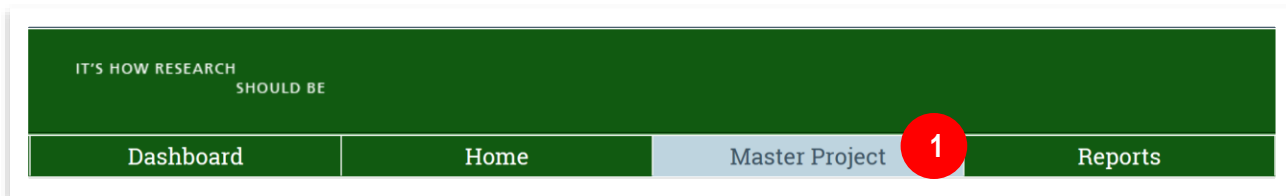


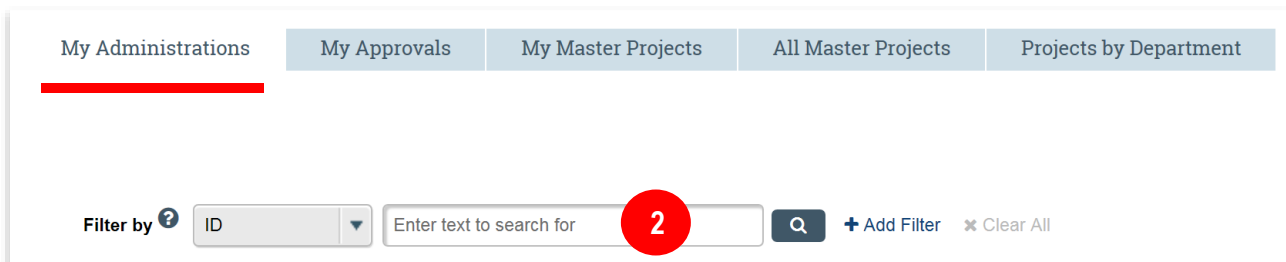
Protocol Specific COI (PSCOI) Disclosure Instructions

To create a PSCOI disclosure, login to RUSH's Research Portal and complete the following steps.

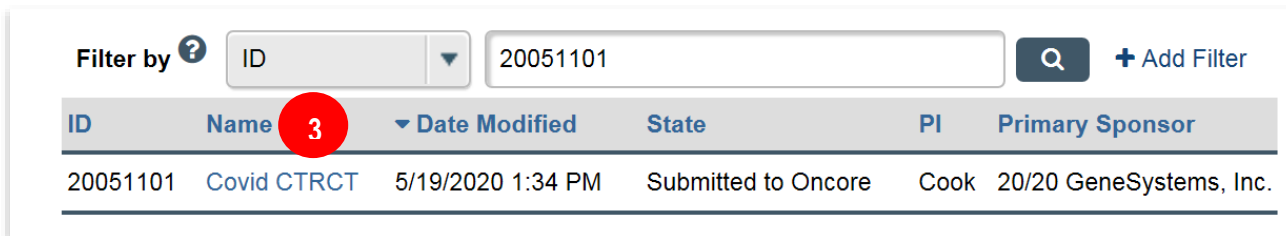
- 1) From the main portal page, click the **Master Project** tab (located at the top green menu bar).



- 2) From the My Administrations page, enter the **ORA number** in the text box shown below and press the **Enter** key. Be sure 'ID' is displayed in the **Filter by** dropdown menu.



- 3) Click the **hyperlink of the ORA study name**. This will take you to the Master Project Summary Workspace page.



- 4) From the **Master Project Summary Workspace** page, scroll down until you reach the **Create** section (located on the left column of the page), and click the **Conflict of Interest** button.



- 5) From the Welcome page begin your disclosure. **Answer all three questions with a red asterisk (*)**. **Note:** A red asterisk (*) indicates a required field and must be answered before moving on to the next page. **After answering each question, click the Continue>>** button along the right. This will take you to the COI Role Study page.

The screenshot shows a form with three questions, each marked with a red asterisk (*):

- * Is this a new disclosure? Yes No [Clear](#)
- * Do you have a financial interest to disclose? Yes No [Clear](#)
- * Is it an update to a previous disclosure submitted to this project? Yes No [Clear](#)

A red circle with the number "5" is overlaid on the right side of the form.

- 6) From the **COI Role Study** page, **scroll down** until you reach the section **Role in Study** and **choose your role(s)** for that specific study. Example is shown below.

* **Role in Study:** **6**

Statistical Analysis

Data Analysis

Data Collection

Recruitment

- 7) Below the list of study roles, **answer the next required question** then **click the Continue>>** button along the right. This will take you to the COI Disclosure – Activity page.

* Will the relationship continue into the next 12 months from the date of this disclosure? Yes No **7**

- 8) From the **COI Disclosure – Activity page**, you will have the option to **select one or more activities** to report. **Choose an activity to make a disclosure by clicking the +Add button.**

Sponsored Travel:

+ Add **8**

Organization	Destination	Travel Date	Purpose of Trip
--------------	-------------	-------------	-----------------

- a) A window will appear for you to add an Entity or Sponsor and the related financial or fiduciary activity. After answering all questions, **click the Continue>>** button along the right.
- b) If the Entity or Sponsor is not listed in the dropdown list. **Go back** to the **Master Project** main page and **scroll down** until you reached **My Activities** (located on the left column of the page) and **click the 'Request New Prime or Direct Sponsor'** button. Provide the requested information and the entity will be added to the 'Sponsor' list.
- 9) After entering the activity information, you will be taken back to the **COI Disclosure – Activity page** where you will see a brief summary of your disclosure. When all activities have been reported, **click the Continue>>** button along the right. This will take you to the Explanation of the Conflict of Interest page.

Sponsored Travel:

+ Add

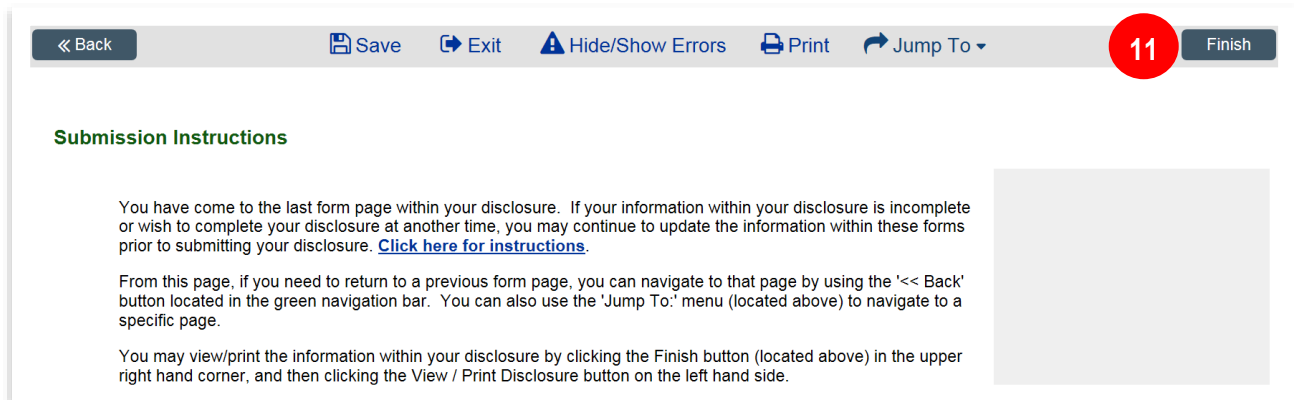
Organization	Destination	Travel Date	Purpose of Trip
<input type="checkbox"/> Update	Abbott Laboratories	Las Vegas	1/1/2020 Describe the purpose of the trip in detail here

9

<< Back **Save** **Exit** **Hide/Show Errors** **Print** **Jump To** **Continue >>**

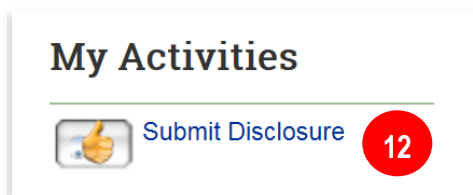
- 10) From the **Explanation of the Conflict of Interest page**, **explain in detail a) the reason of the activity, b) how the disclosed entity(ies) relates to this research protocol**, and **c) how the financial interest is or may be related to this research protocol**. After entering your explanation in the text box, **click the Continue>>** button to the COI Financial Submission page.
- Explanation goes inside the text box **10**

- 11) When you reached the **COI Financial Submission** page, **review the instructions** and **click the Finish** button (upper right corner). You will be taken back to your COI disclosure page where you can submit your disclosure.



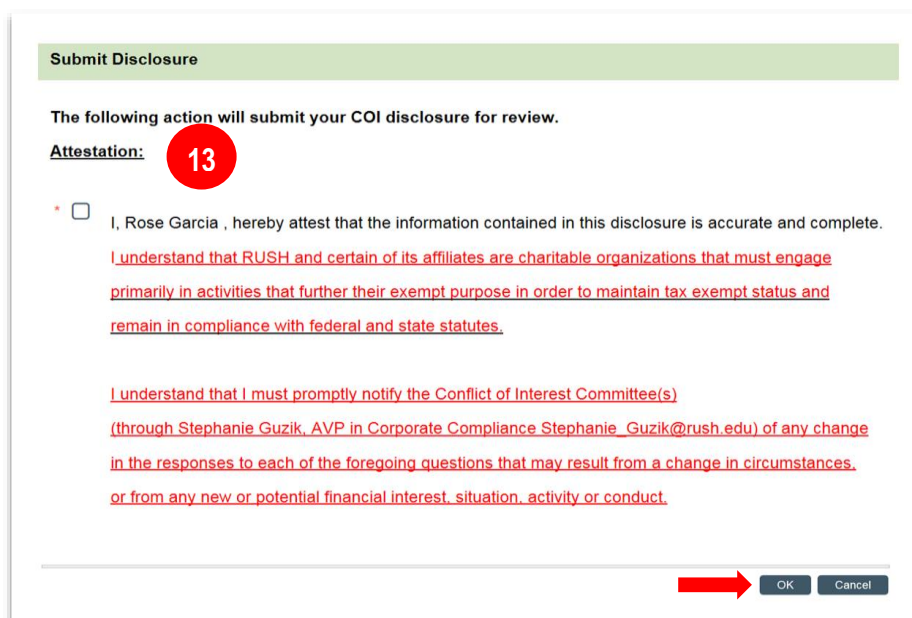
The screenshot shows a navigation bar at the top with buttons for '<< Back', 'Save', 'Exit', 'Hide/Show Errors', 'Print', and 'Jump To'. A red circle with the number '11' is positioned over the 'Finish' button. Below the navigation bar, the heading 'Submission Instructions' is followed by three paragraphs of text. The first paragraph states that the user is on the last form page and provides a link for instructions. The second paragraph explains how to use the 'Back' button and the 'Jump To' menu. The third paragraph describes how to use the 'Finish' button and the 'View / Print Disclosure' button.

- 12) **IMPORTANT:** In order to submit your disclosure, you **must** click the **Submit Disclosure** button (located on the left column under **My Activities**). If you miss this step your disclosure will be incomplete.



The screenshot shows the 'My Activities' section with a red circle containing the number '12' next to the 'Submit Disclosure' button, which is accompanied by a thumbs-up icon.

- 13) If there is no missing information found in your disclosure, you will receive the **Attestation Statement**. **Review the attestation, check the white box** and **click OK at the bottom of the page**. A confirmation will be sent to your email that your PSCOI disclosure was successfully submitted. **End**



The screenshot shows the 'Submit Disclosure' page with a green header. Below the header, it states 'The following action will submit your COI disclosure for review.' The 'Attestation:' section features a red circle with the number '13' next to a white checkbox. The text reads: 'I, Rose Garcia, hereby attest that the information contained in this disclosure is accurate and complete.' Below this, there are two lines of red text: 'I understand that RUSH and certain of its affiliates are charitable organizations that must engage primarily in activities that further their exempt purpose in order to maintain tax exempt status and remain in compliance with federal and state statutes.' and 'I understand that I must promptly notify the Conflict of Interest Committee(s) (through Stephanie Guzik, AVP in Corporate Compliance Stephanie_Guzik@rush.edu) of any change in the responses to each of the foregoing questions that may result from a change in circumstances, or from any new or potential financial interest, situation, activity or conduct.' At the bottom right, there are 'OK' and 'Cancel' buttons, with a red arrow pointing to the 'OK' button.

NOTE: On the attestation page for federally funded researchers you are required to provide the date of your last FCOI training.